



OPERATIONAL SERVICES DIVISION



# All-Liaison Meeting COMMBUYS Ph II Overview and Issues Update



June 23, 2015

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# Agenda

## Walkthrough of COMMBUYS Phase II Functional Changes

- COMMBUYS Purchase Order (PO) approval linked to MMARS encumbering
- Receiving orders in COMMBUYS
- COMMBUYS Invoice approval linked to MMARS payment
- Reminder: Mapping Roles to Process

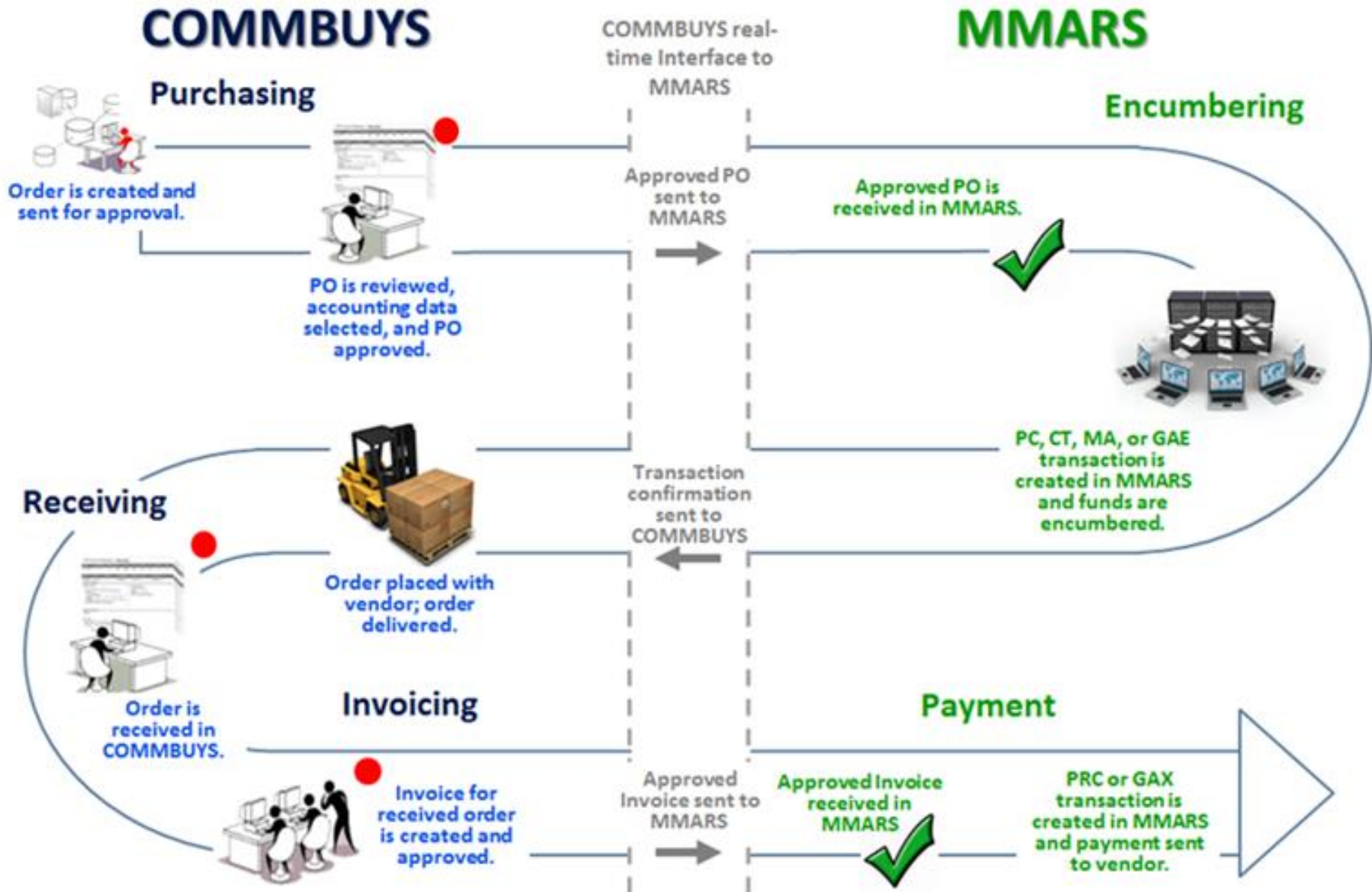
## Updates on Other Functions

- Review and status updates on open issues/questions

## Readiness Updates

- Training program and calendar
- Liaison meeting calendar
- Liaison resources

# Understanding Phase II Features and Functions



# Phase II Functional Changes

## Overview

Goal: Demonstrate the COMMBUYS document workflow from requisition through ready for payment using a simple purchasing scenario.

Scenario: Place an order for cups of different types and sizes. The order is a **Direct Release off of a statewide contract (MBPO)**.

- 3 cases of 5oz. cold cups
- 3 cases of 7oz. cold cups
- 1 case of 8oz foam cups

We will demonstrate:

- Order through Approval
- Creating the receipt (receiving)
- Creating an Invoice

# Requisition, PO and Approval

## Requisition

We begin our purchase with a Release Requisition.

Release Requisition RQ-14-XYZ-ABC-0000000200

Status: 1RI - In Progress

General

Items

Vendors

Address

Accounting

Routing

Attachments

Notes

Reminders

Summary

Confirmation Messages

- Changes saved successfully.

Requisition Number:

RQ-14-XYZ-ABC-0000000200

Short Description\*:

Cup Purchase

Status:

1RI - In Progress

Fiscal Year:

2014

Department\*:

XYZ - Department of XYZ

Organization:

Default Organization

Location\*:

ABC - Test location

Solicitation Enabled:

☐

Required By Date:

Entered Date:

08/11/2015

Requisition Type :

Release

Type Code:

Requestor:

Phil Phobos

Purchaser:

Phobos, Phil

Contact:

Phil Phobos

Contact Phone:

666 666 6666 -

Alternate ID:

Tax Rate:

Estimated Cost:

\$0.00

User Last Updated:

Phil Phobos

Date Last Updated:

08/11/2015 08:41:18 AM

Save & Continue

# Requisition, PO and Approval

## Requisition

On the **Items** tab of the Requisition, we search, locate and add the items to our requisition.

### Release Requisition RQ-14-XYZ-ABC-0000000200

Status: 1RI - In Progress

General Items Vendors Address Accounting Routing Attachments Notes Reminders Summary

General Vendors Address Accounting Notes

Sort by Column: Print Sequence ☐ Sort Descending (Go)

Item #	Links	Print Sequence	Item Description								Total Cost	Delete All <input type="checkbox"/>
			Quantity	Minimum Order Quantity	Catalog Price/ Unit Cost	Net Unit Cost	UOM	Total Discount Amt.	Tax Rate	Tax Amount		
<a href="#">1</a>	Master Blanket # / Line #: <a href="#">0000045</a> / <a href="#">3</a>	1.0	Foodservice Supplies, CUP, COLD PAPER 50Z PATHWAYS, DIXIE, 2400/CS								\$209.49	<input type="checkbox"/>
			3.0	0.0	\$89.83	\$89.83	CS - Case	\$0.00		\$0.00		
<a href="#">2</a>	Master Blanket # / Line #: <a href="#">0000045</a> / <a href="#">4</a>	2.0	Foodservice Supplies, CUP, COLD PAPER 70Z SYMPHONY, SOLO, 2000/CS								\$297.45	<input type="checkbox"/>
			3.0	0.0	\$99.15	\$99.15	EA - Each	\$0.00		\$0.00		
<a href="#">3</a>	Master Blanket # / Line #: <a href="#">0000045</a> / <a href="#">5</a>	3.0	Foodservice Supplies, CUP, FOAM 60Z WHITE, DART, 1000/CS								\$85.00	<input type="checkbox"/>
			1.0	0.0	\$85.00	\$85.00	CS - Case	\$0.00		\$0.00		
										Total	\$571.94	

1 Please save your changes before sorting . Otherwise, your changes will be lost. Please do not search contract po items that have the same NIGP code.

Save & Continue Search Items

# Requisition, PO and Approval

## Accounting Detail

The **Accounting** tab is used to enter the correct accounting information.

- Any Information entered on this tab will be applied to all items in the order
- The Accounting tab contains all the necessary chart of account fields
- Data available for selection will be the data for your organization

If the accounting information is different for any items, that information must be entered on the corresponding **Items/Accounting** subtab.

Release Requisition RQ-15-1080-OSD01-OSDEP-00000005886

General
Items
Vendors
Address
Accounting
Routing
Attachments
Notes
Reminders
Summary

Total Extended Amount = 0.00
Unapplied Distribution Amount = 0.00

Delete All	Fiscal Year	Budget FY*	Period*	Accounting Template	Fund	Sub Fund	Object	Sub Object	Department	Unit	Appr	Location	Sub Location	Activity	Sub Activity	Function	Sub Function	Reporting	Sub Reporting
<input type="checkbox"/>		2015	5		0200		E01			0100	17903000								
Account Code: 2015-5--0200--U03---0100-17903000-----OSD024-																			

*! If using Save Based on Dollars, entered dollar amounts may be adjusted during Rebuild for All Items to ensure proper item account transactions.*

Save Based on Dollars
Save Based on Percentages
Rebuild for All Items
Reset

Status: 3PI - In Progress

Sub Task	Task Order	Program	Phase	Percent	Dollars
				100.0	0.00
Total:				0.0	0.00



# Requisition, PO and Approval

## Accounting Detail

The **Items/Accounting** subtab lists all the items on the requisition.

To change the accounting information for an item, click on the blue hyperlink in the “Item #” column.

Home
Items▼
Documents▼
Vendors▼
Quick Buy
Find It
Phil P

Release Requisition RQ-14-XYZ-ABC-0000000200
Status: 1RI - In Progress

General
Items
Vendors
Address
Accounting
Routing
Attachments
Notes
Reminders
Summary

General
Vendors
Address
Accounting
Notes

Item #	(Account Distribution)Item Description	Select All
<a href="#">1</a>	(0.0% Less than 100% ) Foodservice Supplies, CUP, COLD PAPER 5OZ PATHWAYS, DIXIE, 2400/CS	<input type="checkbox"/>
<a href="#">2</a>	(0.0% Less than 100% ) Foodservice Supplies, CUP, COLD PAPER 7OZ SYMPHONY, SOLO, 2000/CS	<input type="checkbox"/>
<a href="#">3</a>	(0.0% Less than 100% ) Foodservice Supplies, CUP, FOAM 6OZ WHITE, DART, 1000/CS	<input type="checkbox"/>

Delete Selected
Delete All
Reset

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# Requisition, PO and Approval

## Accounting Detail

On **the Items/Accounting** tab, the accounting detail can be entered for the item.

General
**Items**
Vendors
Address
Accounting
Routing
Attachments
Notes
Reminders
Summary

General
Vendors
Address
**Accounting**
Notes

Item #1: Foodservice Supplies, CUP, COLD PAPER 5OZ PATHWAYS, DIXIE, 2400/CS

Total Extended Amount = 0.00
Unapplied Distribution Amount = 0.00

Delete All	Fiscal Year	Budget FY*	Period*	Accounting Template	Fund	Sub Fund	Object	Sub Object	Department	Unit	Appr	Location	Sub Location	Activity	Sub Activity	Function	Sub Function	Reporting	Sub Reporting
<input type="checkbox"/>		2015	5		0200		E01			0100	17903000								
				Account Code: 2015-5--0200--U03---0100-17903000-----OSD024-															

*!* If using Save Based on Dollars, entered dollar amounts may be adjusted during Rebuild for All Items to ensure proper item account transactions.

Save Based on Dollars
Save Based on Percentages
Reset
Cancel & Exit

# Requisition, PO and Approval

## Requisition Approval

Once accounting information is complete on the Requisition, click “Submit for Approval” to advance it to the approval process.

Recommended Vendor: 00000030 - The Grocery Warehouse Gerry Grocery 1 Main street boston, MA 02138 US Email: gro@aol.com Phone: (888)888-8888			
<input type="button" value="Submit for Approval"/>	<input type="button" value="Cancel Requisition"/>	<input type="button" value="Clone Requisition"/>	<input type="button" value="Print"/>
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# Requisition, PO and Approval

## Requisition Approval

While an order might require more than one approval, the final approver for the transaction to proceed successfully must have appropriate MMARS encumbrance permissions.

In this example, the final approver is Laura Mars. Laura is a COMMBUYS approver with the appropriate MMARS permissions who has been added to the “MMARS Encumbrance” approval path.

### Release Requisition RQ-15-PQR01-PQR01-0000000203

Status: 1RI - In Progress

The following 2 approval paths meet the document criteria.

Approval Path	Path Type	Path Priority Sequence	Description	Dollar Range	Approvers		
					User	Level	Type
PUR01	all purchases	10	All Purchases	\$0.01-\$999,999,999,999.00	Paul Comparetti	1	Primary
					Renee O'Rourke	1	Alternate
ENC01	encumbrance	99	encumbrances	\$0.01-\$999,999,999,999.00	Laura Mars	1	Primary
					Renee O'Rourke	1	Alternate

Please click Continue to continue submitting the document, or click Cancel & Exit to cancel the document submission and go back to the document.

Continue

Cancel & Exit

# Requisition, PO and Approval

## Purchase Order Creation

After approval, the Requisition becomes a **Purchase Order**. The order is sent to the vendor and awaits receiving.

### Release Requisition RQ-14-XYZ-ABC-0000000200 - Purchase Order(s) Created

Status: 1RGP -  
Gone to PO

The following Purchase Order(s) were created:

PO #	Vendor	Total	Date Created	Status
<a href="#">0000045: 18</a>	<a href="#">The Grocery Warehouse</a>	\$571.94	08/11/2015	3PRS - Ready to Send

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# Receiving in COMMBUYS

## Overview

With a three-way match, you need to **Receive** in order to **Pay**. Once a Purchase Order is sent, the Receiving functionality is enabled for that PO.

- Let's assume our cups have arrived, and the responsible party has checked them in and has the packing slip.
- Continue to follow procedures as you do today to physically receive goods or services. The only difference now is that you will record the data in COMMBUYS, creating an electronic receipt.
- The Receipt can be created directly from a sent PO or created from the document dropdown.
- We will explain 2 different receipt scenarios:
  - ✓ a complete, full receipt and
  - ✓ a partial receipt.

# Receiving in COMMBUYS

## Creating a Receipt (Three-Way Match Example)

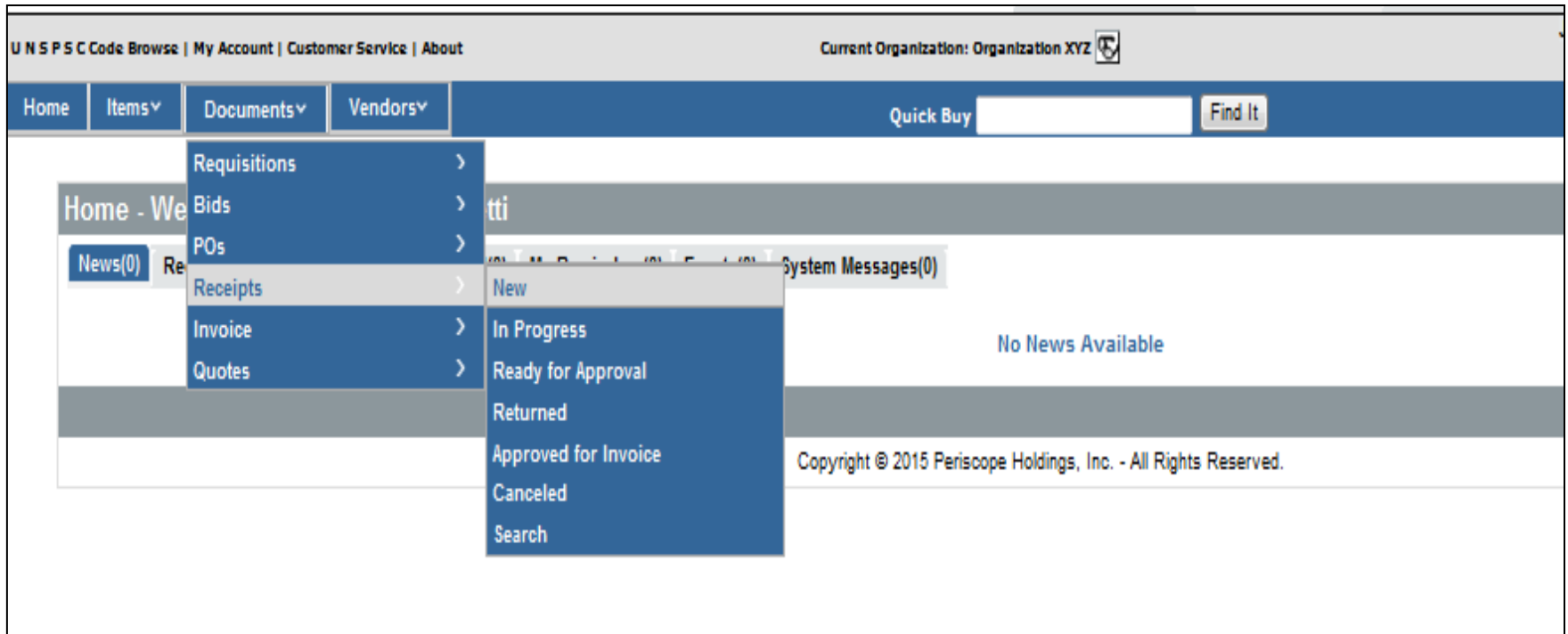
A PO in a “sent” status has a “Create Receipt” button. A **Receipt** can be started by clicking this button.

Attachments				
Agency Files:				
Agency Forms:				
Vendor Files:				
Vendor Forms:				
Vendor Information & PO Terms				
Vendor:	<a href="#">00000030 - The Grocery Warehouse</a>		Preferred Delivery Method:	Email
Remit-to Address:	Gerry Grocery 1 Main street boston, MA 02138 US Email: gro@aol.com Phone: (888)888-8888 Id: 1905		Payment Terms:	
PO Mailing Address:	Gerry Grocery 1 Main street boston, MA 02138 US Email: gro@aol.com Phone: (888)888-8888 Id: 1905		Shipping Terms:	
Receipt Information		Create Receipt		
No receipts found for this purchase order.				
Invoice Information				
There are no invoices.				

# Receiving in COMMBUYS

## Creating a Receipt

We will create our **Receipt** from the documents dropdown menu.





# Receiving in COMMBUYS

## Creating a Receipt

To create the **Receipt**, we need to locate the PO.

PO Receipts - Search PO


Search Using:	ALL of the criteria ▼	
Search Fields:	PO #	45
	Release Number	18
	PO Description	
	Alternate ID	
	PO Type	▼
	Buyer	Phobos, Phil ▼
	Header Major Status	▼
	Header Minor Status	▼
	Department	▼
	Location	▼
	Type Code	▼
	PO Date(MM/DD/YYYY)	<input type="text"/>
	Catalog	▼
	Required Date(MM/DD/YYYY)	<input type="text"/>
	Update Date(MM/DD/YYYY)	<input type="text"/>
Vendor ID:	<input type="text"/>	
Vendor Name:	<input type="text"/>	
Fiscal Year	<input type="text"/>	
Item Description	<input type="text"/>	
U N S P S C Segment-Family	▼	
U N S P S C Class	▼	
Commodity-EPP	<input type="text"/>	
Stock Item Number	<input type="text"/>	
Find It		Clear


# Receiving in COMMBUYS

## Creating a Receipt

Once you locate the PO, select it.

Blanket Results

 You will not be able to select a purchase order if you are not authorized to enter new receipts against that purchase order.

Select	Purchase Order #	Purchase Order Date	Description	Dept/Loc	Purchaser	Vendor Name	Total	Status
	<a href="#">0000045:18</a>	06/11/2015	Cup Purchase	XYZ/ABC	Phil Phobos	The Grocery Warehouse	\$571.94	3PS - Sent

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# Receiving in COMMBUYS

## Receipt Details

Enter the receipt information.

### New Receipt - Purchase Order # 0000045:18

[General](#) [Items](#) [Attachments](#) [Notes](#) [Summary](#) [Back to PO](#)

#### Confirmation Messages

- Changes saved successfully.

Receipt Number:

PO Number: 0000045 :18

Receipt Description\*: Cups Received

Department \*: XYZ - Department of XYZ

Location \*: XYZ - Test location

Receipt Owner \*: Phobos, Phil

Receipt Status: 5CI - In Progress

PO Status: 3PS - Sent

Alternate ID:

[Save & Continue](#)

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# Receiving in COMMBUYS

## Creating a Receipt

A list of all the items on the PO displays. For this scenario, we will receive all items.

PO Item #	Item Description									Actions
	Receipt Method	Catalog Price/ Unit Cost	UOM	Ordered Quantity/Dollars	Received Quantity/Dollars Receipt Total(PO Receipts Total)	Returned Quantity/Dollars Receipt Total(PO Receipts Total)	Canceled Quantity Receipt Total(PO Receipts Total)	Net Received Quantity/Dollars Receipt Total(PO Receipts Total)	Remaining Quantity/Dollars	
<u>1</u>	Foodservice Supplies, CUP, COLD PAPER 5OZ PATHWAYS, DIXIE, 2400/CS									<input type="button" value="Add Receiving"/>  <input type="button" value="Cancel Item"/>
	Quantity	\$69.83	CS - Case	3.0	Received Qty: 0.0(0.0) Qty Adj: 0.0(0.0) <hr/> 0.0(0.0)	Returned Qty: 0.0(0.0) Qty Adj: 0.0(0.0) <hr/> 0.0(0.0)	Canceled Qty: 0.0(0.0) Qty Qty: 0.0(0.0) <hr/> 0.0(0.0)	0.0(0.0)	3.0	
<u>2</u>	Foodservice Supplies, CUP, COLD PAPER 7OZ SYMPHONY, SOLO, 2000/CS									<input type="button" value="Add Receiving"/>  <input type="button" value="Cancel Item"/>
	Quantity	\$99.15	EA - Each	3.0	Received Qty: 0.0(0.0) Qty Adj: 0.0(0.0) <hr/> 0.0(0.0)	Returned Qty: 0.0(0.0) Qty Adj: 0.0(0.0) <hr/> 0.0(0.0)	Canceled Qty: 0.0(0.0) Qty Qty: 0.0(0.0) <hr/> 0.0(0.0)	0.0(0.0)	3.0	
<u>3</u>	Foodservice Supplies, CUP, FOAM 6OZ WHITE, DART, 1000/CS									<input type="button" value="Add Receiving"/>  <input type="button" value="Cancel Item"/>
	Quantity	\$65.00	CS - Case	1.0	Received Qty: 0.0(0.0) Qty Adj: 0.0(0.0) <hr/> 0.0(0.0)	Returned Qty: 0.0(0.0) Qty Adj: 0.0(0.0) <hr/> 0.0(0.0)	Canceled Qty: 0.0(0.0) Qty Qty: 0.0(0.0) <hr/> 0.0(0.0)	0.0(0.0)	1.0	

**Receive All Defaults**  
 Receipt Date: 06/11/2015 09:42:16 AM  (MM/DD/YYYY HH:MM:SS AM or PM)

**Cancel All Defaults**  
 Cancel Date: 06/11/2015 09:42:16 AM  (MM/DD/YYYY HH:MM:SS AM or PM)

**Comment \***

Received/returned/canceled quantity of receipts in status "5CC - Canceled" and "5CRT - Returned" is ignored when calculating received/returned/canceled quantity for a PO item.

# Receiving in COMMBUYS

The “Net Received” column shows everything received, and compares it to the “Ordered” column to determine any outstanding quantities.  
In the illustration here, there is nothing remaining.

General Items Attachments Notes Summary <a href="#">Back to PO</a>									
General Notes									
PO Item #	Item Description								Actions
	Receipt Method	Catalog Price/ Unit Cost	UOM	Ordered Quantity/Dollars	Received Quantity/Dollars Receipt Total(PO Receipts Total)	Returned Quantity/Dollars Receipt Total(PO Receipts Total)	Canceled Quantity Receipt Total(PO Receipts Total)	Net Received Quantity/Dollars Receipt Total(PO Receipts Total)	Remaining Quantity/Dollars
1	Foodservice Supplies, CUP, COLD PAPER 5OZ PATHWAYS, DIXIE, 2400/CS								
	Quantity	\$69.83	CS - Case	3.0	Received Qty: 3.0(3.0) Qty Adj: 0.0(0.0) 3.0(3.0)	Returned Qty: 0.0(0.0) Qty Adj: 0.0(0.0) 0.0(0.0)	Canceled Qty: 0.0(0.0) Qty Qty: 0.0(0.0) 0.0(0.0)	3.0(3.0)	0.0
2	Foodservice Supplies, CUP, COLD PAPER 7OZ SYMPHONY, SOLO, 2000/CS								
	Quantity	\$99.15	EA - Each	3.0	Received Qty: 3.0(3.0) Qty Adj: 0.0(0.0) 3.0(3.0)	Returned Qty: 0.0(0.0) Qty Adj: 0.0(0.0) 0.0(0.0)	Canceled Qty: 0.0(0.0) Qty Qty: 0.0(0.0) 0.0(0.0)	3.0(3.0)	0.0
3	Foodservice Supplies, CUP, FOAM 8OZ WHITE, DART, 1000/CS								
	Quantity	\$65.00	CS - Case	1.0	Received Qty: 1.0(1.0) Qty Adj: 0.0(0.0) 1.0(1.0)	Returned Qty: 0.0(0.0) Qty Adj: 0.0(0.0) 0.0(0.0)	Canceled Qty: 0.0(0.0) Qty Qty: 0.0(0.0) 0.0(0.0)	1.0(1.0)	0.0
1 Received/returned/canceled quantity of receipts in status "SCC - Canceled" and "SCRT - Returned" is ignored when calculating received/returned/canceled quantity for a PO item.									
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# Receiving in COMMBUYS

Once approved the receipt goes to **Approved for Invoice** status.

**Receipt # 000007 (Approved for Invoice) - Purchase Order # 000045:18**

<a href="#">General</a>   <a href="#">Items</a>   <a href="#">Attachments</a>   <a href="#">Notes</a>   <a href="#">Summary</a>   <a href="#">Back to PO</a>					
<b>Header Information</b>					
<b>Receipt Number:</b>	000007	<b>Receipt Status:</b>	5CA - Approved for Invoice	<b>Receipt Description:</b>	Cups Received
<b>PO Number:</b>	<a href="#">000045:18</a>	<b>PO Status:</b>	3PCR - Complete Receipt	<b>Alternate ID:</b>	
<b>Department:</b>	XYZ - Department of XYZ	<b>Location:</b>	ABC - Test location	<b>Receipt Owner:</b>	Phil Phobos
<b>User Created:</b>	Phil Phobos	<b>Date Created:</b>	06/11/2015 09:42:11 AM	<b>User Last Updated:</b>	Phil Phobos
<b>Date Last Updated:</b>	06/11/2015 09:46:07 AM				
<b>Attachments</b>					
<b>Files:</b>					
<b>Forms:</b>					

# Receiving in COMMBUYS

## Partial Receipt

Sometimes we don't receive everything ordered in the same shipment.

In this scenario, we only received 2 cases of the 5 ounce cups.

To record a partial receipt, click the "Add Receiving" button to the right of the item.

PO Item #	Item Description									Actions
	Receipt Method	Catalog Price/ Unit Cost	UOM	Ordered Quantity/Dollars	Received Quantity/Dollars Receipt Total(PO Receipts Total)	Returned Quantity/Dollars Receipt Total(PO Receipts Total)	Canceled Quantity Receipt Total(PO Receipts Total)	Net Received Quantity/Dollars Receipt Total(PO Receipts Total)	Remaining Quantity/Dollars	
1	Foodservice Supplies, CUP, COLD PAPER 5OZ PATHWAYS, DIXIE, 2400/CS									<input type="button" value="Add Receiving"/> <input type="button" value="Cancel Item"/>
	Quantity	\$89.83	CS - Case	3.0	Received Qty: 0.0(0.0) Qty Adj: 0.0(0.0) 0.0(0.0)	Returned Qty: 0.0(0.0) Qty Adj: 0.0(0.0) 0.0(0.0)	Canceled Qty: 0.0(0.0) Qty Qty: 0.0(0.0) 0.0(0.0)	0.0(0.0)	3.0	
2	Foodservice Supplies, CUP, COLD PAPER 7OZ SYMPHONY, SOLO, 2000/CS									<input type="button" value="Add Receiving"/> <input type="button" value="Cancel Item"/>
	Quantity	\$99.15	EA - Each	3.0	Received Qty: 0.0(0.0) Qty Adj: 0.0(0.0) 0.0(0.0)	Returned Qty: 0.0(0.0) Qty Adj: 0.0(0.0) 0.0(0.0)	Canceled Qty: 0.0(0.0) Qty Qty: 0.0(0.0) 0.0(0.0)	0.0(0.0)	3.0	
3	Foodservice Supplies, CUP, FOAM 8OZ WHITE, DART, 1000/CS									<input type="button" value="Add Receiving"/> <input type="button" value="Cancel Item"/>
	Quantity	\$65.00	CS - Case	1.0	Received Qty: 0.0(0.0) Qty Adj: 0.0(0.0) 0.0(0.0)	Returned Qty: 0.0(0.0) Qty Adj: 0.0(0.0) 0.0(0.0)	Canceled Qty: 0.0(0.0) Qty Qty: 0.0(0.0) 0.0(0.0)	0.0(0.0)	1.0	

**Receive All Defaults**

Receipt Date: 06/11/2015 09:42:16 AM (MM/DD/YYYY HH:MM:SS AM or PM)

**Cancel All Defaults**

Cancel Date: 06/11/2015 09:42:16 AM (MM/DD/YYYY HH:MM:SS AM or PM)

**Comment \***

1 Received/returned/canceled quantity of receipts in status "SCC - Canceled" and "SCRT - Returned" is ignored when calculating received/returned/canceled quantity for a PO item.



# Receiving in COMMBUYS

## Partial Receipt

The item opens up. Note the “Receipt Item Receiving/Return Details” area of the screen. We enter “2” in our quantity, add comments, then save.

PO Item #:	1	Receipt Item #:	1	PO Item Status:	3P5 - Sent
Receipt Method:	Quantity	Date Received: (MM/DD/YYYY HH:MM:SS AM or PM)	06/11/2015 09:56:40 AM	Received By:	Phil Phobos
PO Item Description: Foodservice Supplies, CUP, COLD PAPER 5OZ PATHWAYS, DIXIE, 2400/CS					

Unit Cost	UOM	Ordered Quantity Receipt Total(PO Receipts Total)	Received Quantity Receipt Total(PO Receipts Total)	Returned Quantity Receipt Total(PO Receipts Total)	Canceled Quantity Receipt Total(PO Receipts Total)	Net Received Quantity Receipt Total(PO Receipts Total)	Remaining Quantity
\$69.83	CS - Case	3.0	Received Qty: 0.0(0.0) Qty Adj: 0.0(0.0)	Returned Qty: 0.0(0.0) Qty Adj: 0.0(0.0)	Canceled Qty: 0.0(0.0) Qty Adj: 0.0(0.0)	0.0(0.0)	3.0

Receipt Item Receiving/Return Details		
Receipt Type	Quantity	Comment (max 250 characters) Required for Receipt Type Return
Receiving	2.0	
Return	0.0	

Received/returned/canceled quantity of receipts in status "5CC - Canceled" and "5CRT - Returned" is ignored when calculating received/returned/canceled quantity for a PO item.

Save & Continue Save & Exit Reset Cancel & Exit

# Receiving in COMMBUYS

## Partial Receipt

We now see we have 2 items received and 1 remaining.

We can still go to Invoice, but partial receiving will provide added control to ensure that purchasers only pay for what they have received.

PO Item Receiving Summary
View Item History

Unit Cost	UOM	Ordered Quantity Receipt Total(PO Receipts Total)	Received Quantity Receipt Total(PO Receipts Total)	Returned Quantity Receipt Total(PO Receipts Total)	Canceled Quantity Receipt Total(PO Receipts Total)	Net Received Quantity Receipt Total(PO Receipts Total)	Remaining Quantity
\$69.83	CS - Case	3.0	Received Qty: 2.0(2.0) Qty Adj: 0.0(0.0) <hr/> 2.0(2.0)	Returned Qty: 0.0(0.0) Qty Adj: 0.0(0.0) <hr/> 0.0(0.0)	Canceled Qty: 0.0(0.0) Qty Adj: 0.0(0.0) <hr/> 0.0(0.0)	2.0(2.0)	1.0

Receipt Item Receiving/Return Details

Receipt Type	Quantity	Comment
Receiving	2.0	

Received/returned/canceled quantity of receipts in status "5CC - Canceled" and "5CRT - Returned" is ignored when calculating received/returned/canceled quantity for a PO item.

Exit

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# Invoices

## Overview

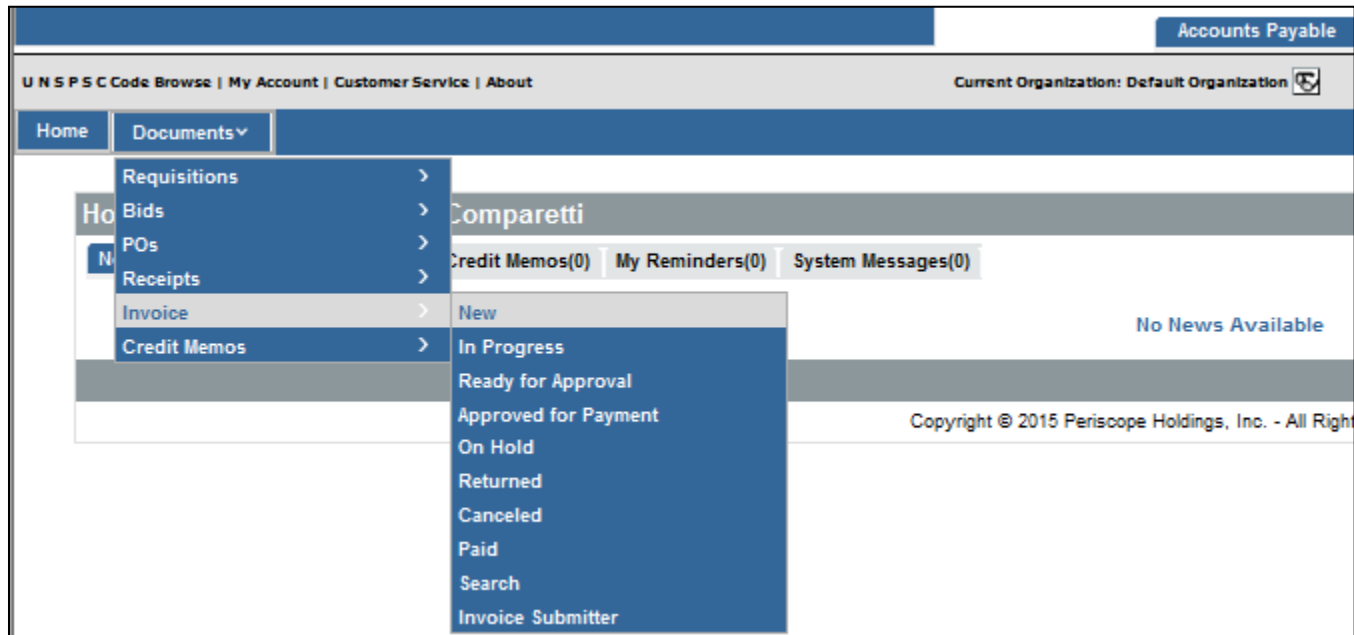
Once items are received, the items are in “complete receipt” status and are ready for invoicing.

- Invoice **preparers** must be set up as **Accounts Payable (AP)users** in COMMBUYS. Individuals in this role do not have to be MMARS users.
- An Invoice **approver** and payer must have an **Accounts Payable (AP) Supervisor** role in COMMBUYS and have the AP role in MMARS.
- Accounts Payable supervisors must have MMARS payment permissions that enable them to create PRC and GAX transactions and process them to final.

# Invoices

## Creating an Invoice

The AP User begins the new **Invoice** from the Documents menu.



# Invoices

## Creating an Invoice

From the search screen we locate the PO.

New Invoice - Search PO

Search Using: ALL of the criteria

PO #

45

Release Number

20

PO Description

Alternate ID

PO Type

Buyer

Comparetti, Paul

Header Major Status

Header Minor Status

Department

Location

Search Fields: Type Code

PO Date(MM/DD/YYYY)

Catalog

Required Date(MM/DD/YYYY)

Update Date(MM/DD/YYYY)

Vendor ID:

Vendor Name:

Fiscal Year

Item Description

U N S P S C Segment-Family

U N S P S C Class

Commodity-EPP

Stock Item Number

Find It

Clear

# Invoices

## Creating an Invoice

A list of received POs displays. Select the Purchase Order for which you would like to create an Invoice.

Blanket Results

**i** You will not be able to select a purchase order if the purchase order has no po items that can create invoice items from.

Select	Purchase Order #	Purchase Order Date	Description	Dept/Loc	Purchaser	Vendor Name	Total	Status	Permit to pay
<input type="radio"/>	<a href="#">0000045:20</a>	08/11/2015	test	XYZ01/PUR01	Paul Comparetti	The Grocery Warehouse	\$571.94	3PCR - Complete Receipt	\$571.94

Select

Exit

# Invoices

## Creating an Invoice

The **New Invoice** screen displays. The invoice screen contains tabs for entry, just like all other COMMBUYS documents.

### New Invoice

General
Items
Credits
Subcontractors
Accounts
Routing
Attachments
Notes
Reminder
Change Order
Summary
[Back to PO](#)

Confirmation Messages

- Changes saved successfully.

Invoice number*:		Invoice Status:	411 - In Progress
Invoice Type:	3 way matching	Invoice Description*:	
Invoice Date *(MM/DD/YYYY):	06/11/2015	Effective Date *(MM/DD/YYYY):	06/11/2015
Payment Amount:	\$0.00	Handling Code:	
Paid-BankId/CheckNbr:		Payment Date *(MM/DD/YYYY):	07/06/2015
Payment Terms:		Payment Discount:	0.0 %
Payment Terms Day:	0		
Alternate Id:			

#### Purchase Order Information

PO #:	0000045:20	PO Description	test
Buyer:	Paul Comparetti		
PO Amount:	\$571.94	Remaining To Invoice:	\$0.00

#### Vendor Information

Vendor :	00000030 - The Grocery Warehouse	Address Grp:	01
Tax ID #:	*****7777	Vendor Remit-to Address*:	General Mailing Address - Gerry Grocery 1 Main street boston, MA ...
Remit Text:			Gerry Grocery 1 Main street boston, MA 02138 US Email: gro@aol.com Phone: (606)606-0000



# Invoices

## Creating an Invoice

On the **General** tab, complete the required fields. Note that there is an “Invoice Description” field, an “Effective Date” field, and a “Payment Date” field.

- The ***actual payment date is not reflected*** on the COMMBUYS invoice screen.
- The contract terms set up in MMARS drive the vendor payment.

**Invoice #: 123456789 Vendor #:00000030 Vendor Group #:01**

General
Items
Credits
Subcontractors
Accounts
Routing
Attachments
Notes
Reminder
Change Order
Summary
[Back to PO](#)

**Confirmation Messages**

- Changes saved successfully.

Invoice number:	123456789	Invoice Status:	411 - In Progress
Invoice Type:	3 way matching	Invoice Description *:	<input type="text" value="enter description"/>
Invoice Date *(MM/DD/YYYY):	<input type="text" value="06/11/2015"/>	Effective Date *(MM/DD/YYYY):	<input type="text" value="06/11/2015"/>
Payment Amount:	\$0.00	Handling Code:	<input type="text"/>
Paid-BankId/CheckNbr:		Payment Date *(MM/DD/YYYY):	<input type="text" value="07/06/2015"/>
Payment Terms:		Payment Discount:	0.0 %
Payment Terms Day:	0	<a href="#">Misc Amount:</a>	\$0.00
Alternate Id:	<input type="text"/>	<a href="#">Freight Amount:</a>	\$0.00
Entered By:	Paul Comparetti	Credit Amount:	\$0.00
Entered Date:	06/11/2015	Last Date Updated:	06/11/2015
Last User Updated:	Paul Comparetti		

# Invoices

## Creating an Invoice

On the **Items** tab, enter the invoice amount for each item.

- Select either “Pay All Items” if the Permit to Pay amount equals the amount on the vendor’s invoice for each item, or enter specific amounts for each item and click “Save and Continue” if the amounts are different than the Permit to Pay
  - ✓ “Save and Continue” will save any entered data and keep you on the same screen.
  - ✓ “Pay All Items” will set the entered invoice amount for each item to Permit to Pay. The Invoice will then be ready to submit for approval.
- NOTE: The “Final Pay” indicator is internal to COMMBUYS. It will close out COMMBUYS activity for the encumbered PO but will not go over as the final pay indicator to MMARS.

[Home](#)
[Documents](#)
Paul Comporetti

**Invoice #: 123456789 Vendor #:00000030 Vendor Group #:01**
Status: 411 - In Progress

[General](#)
[Items](#)
[Credits](#)
[Subcontractors](#)
[Accounts](#)
[Routing](#)
[Attachments](#)
[Notes](#)
[Reminder](#)
[Change Order](#)
[Summary](#)
[Back to PO](#)

**Item General Validation Errors**

- You must pay at least one item (invoice amount != 0).

Invoice Item #/ PO Item #	Item Description false							
	PO Item Status	PO Item Amount	Previous Invoice Amount	Permit To Pay (In Progress) ⓘ	Invoice Amount	Discount %	Original Pay Amount	Final Pay <input type="checkbox"/>
1	Foodservice Supplies, CUP, COLD PAPER 5OZ PATHWAYS, DIXIE, 2400/CS ( Net Unit Cost: \$89.83000 )							
	3PCR - Complete Receipt	\$209.49	\$0.00	\$209.49 (\$0.00)	0.0	0.0%	\$0.00	<input type="checkbox"/>
2	Foodservice Supplies, CUP, COLD PAPER 7OZ SYMPHONY, SOLO, 2000/CS ( Net Unit Cost: \$99.15000 )							
	3PCR - Complete Receipt	\$297.45	\$0.00	\$297.45 (\$0.00)	0.0	0.0%	\$0.00	<input type="checkbox"/>
3	Foodservice Supplies, CUP, FOAM 6OZ WHITE, DART, 1000/CS ( Net Unit Cost: \$65.00000 )							
	3PCR - Complete Receipt	\$65.00	\$0.00	\$65.00 (\$0.00)	0.0	0.0%	\$0.00	<input type="checkbox"/>
					Invoice Amount Total: \$0.00			

[Pay All Items](#)
[Save & Continue](#)

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# Invoices

## Creating an Invoice

This Invoice Amount message will display.

Home Documents

**Invoice #: 123456789 Vendor #:00000030 Vendor Group #:01**

General **Items** Credits Subcontractors Accounts Routing Attachments Notes Reminder Change Order Summary [Back to PO](#)

**Item General Validation Errors**

- You must pay at least one item (invoice amount != 0).

Invoice Item #/ PO Item #	PO Item Status				
1	Foodservice Supplies, CUP, COLD PAPER 50Z 3PCR - Complete Receipt				
2	Foodservice Supplies, CUP, COLD PAPER 7OZ SYMPHONY, SOLO, 2000/CS ( Net Unit Cost: \$99.15000 ) 3PCR - Complete Receipt	\$297.45	\$0.00	\$297.45 (\$0.00)	0.0
	Foodservice Supplies, CUP, FOAM 6OZ WHITE, DART, 1000/CS ( Net Unit Cost: \$85.00000 )				

Message from webpage

The Invoice Amount for each item will be set to the Permit To Pay amount. Continue?

OK Cancel

# Invoices

## Creating an Invoice

Here we have entered our dollar amounts and checked “Final Pay” for each item.

Click “Pay All Items.”

**Invoice #: 123456789 Vendor #:00000030 Vendor Group #:01**
Status: 411 - In Progress

[General](#) [Items](#) [Credits](#) [Subcontractors](#) [Accounts](#) [Routing](#) [Attachments](#) [Notes](#) [Reminder](#) [Change Order](#) [Summary](#) [Back to PO](#)

**Confirmation Messages**  

- Changes saved successfully.

Invoice Item #/ PO Item #	Item Description false							
	PO Item Status	PO Item Amount	Previous Invoice Amount	Permit To Pay (In Progress) ⓘ	Invoice Amount	Discount %	Original Pay Amount	Final Pay <input checked="" type="checkbox"/>
1	Foodservice Supplies, CUP, COLD PAPER 5OZ PATHWAYS, DIXIE, 2400/CS ( Net Unit Cost: \$89.83000 )							
	3PCR - Complete Receipt	\$209.49	\$0.00	\$209.49 (\$209.49)	209.49	0.0%	\$0.00	<input checked="" type="checkbox"/>
2	Foodservice Supplies, CUP, COLD PAPER 7OZ SYMPHONY, SOLO, 2000/CS ( Net Unit Cost: \$99.15000 )							
	3PCR - Complete Receipt	\$297.45	\$0.00	\$297.45 (\$297.45)	297.45	0.0%	\$0.00	<input checked="" type="checkbox"/>
3	Foodservice Supplies, CUP, FOAM 6OZ WHITE, DART, 1000/CS ( Net Unit Cost: \$85.00000 )							
	3PCR - Complete Receipt	\$85.00	\$0.00	\$85.00 (\$85.00)	65.0	0.0%	\$0.00	<input checked="" type="checkbox"/>
					Invoice Amount Total: \$571.94			

Pay All Items
Save & Continue

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# Invoices

## Submit Invoice for Approval

We can now submit the **Invoice** for approval. The invoice creator at this point in the process does not have to be a MMARS user, but the **invoice approver** does.

Item Information					
Invoice Item #/PO Item #: 1		Foodservice Supplies, CUP, COLD PAPER 5OZ PATHWAYS, DIXIE, 2400/CS ( Net Unit Cost: \$69.83000 )			
PO Item Status	Permit To Pay (In Progress) ⓘ	Invoice Amount	Discount %	Original Pay Amount	Final Pay
3PCR - Complete Receipt	\$209.49 (\$209.49)	\$209.49	0.0%	\$0.00	Yes
Invoice Item #/PO Item #: 2		Foodservice Supplies, CUP, COLD PAPER 7OZ SYMPHONY, SOLO, 2000/CS ( Net Unit Cost: \$99.15000 )			
PO Item Status	Permit To Pay (In Progress) ⓘ	Invoice Amount	Discount %	Original Pay Amount	Final Pay
3PCR - Complete Receipt	\$297.45 (\$297.45)	\$297.45	0.0%	\$0.00	Yes
Invoice Item #/PO Item #: 3		Foodservice Supplies, CUP, FOAM 8OZ WHITE, DART, 1000/CS ( Net Unit Cost: \$85.00000 )			
PO Item Status	Permit To Pay (In Progress) ⓘ	Invoice Amount	Discount %	Original Pay Amount	Final Pay
3PCR - Complete Receipt	\$85.00 (\$85.00)	\$85.00	0.0%	\$0.00	Yes
<div> <input type="button" value="Submit for Approval"/> <input type="button" value="Cancel Invoice"/> <input type="button" value="Print"/> </div>					

# Invoices

## Approved for Payment

Once approved, the **Invoice** is approved for payment.  
When we send the approval for payment, another final approval will be required.  
This approver must be an AP Supervisor and MMARS user.

Invoice #: 123456789 Vendor #:00000030 Vendor Group #:01

Status: 4IA - Approved for Payment

General Items Credits Subcontractors Accounts Routing Attachments Notes Reminder Change Order Summary Back to PO

Header Information

Invoice Number:	123456789	Invoice Status:	4IA - Approved for Payment	Invoice Type:	3 way matching
Invoice Description:	cups 8/10/15	Invoice Date:	08/11/2015	Effect Date:	08/11/2015
Payment Amount:	\$571.94	Handling Code:		Payment Date:	07/08/2015
Payment Terms:		Payment Term Day:	0	Payment Discount:	0.0%
Paid-Bank/Check:		Alternate Id:			
Entered By:	Paul Comparetti	Entered Date:	08/11/2015		
Credit Amount:	\$0.00				
Updated By:	Paul Comparetti	Updated Date:	08/11/2015		

Attachments

Attachments

# Reminder: Mapping Roles to Process

## COMMBUYS/MMARS Linkage Points

FUNCTION	COMMBUYS Role	MMARS Role
<b>Provides final approval for orders</b>	Department Access, BP User, or BP Supervisor set up as approvers	Encumbrance
<b>Records receipt of goods/services</b>	Department Access or Basic Purchaser	N/A
<b>Prepare payment requests (Invoices)</b>	Accounts Payable User	N/A
<b>Approves Payment to Vendors</b>	Accounts Payable Supervisor	Payment

**Agencies should start now to review your MMARS and COMMBUYS user populations with the following in mind:**

- ✓ Determining the group of people that will be final approvers for orders in COMMBUYS, and ensuring that they are MMARS encumbrance users. Most agencies probably have some COMMBUYS BP Users or BP Supervisors with the necessary MMARS access for encumbering.
- ✓ Determining who will need to be added to COMMBUYS as an AP Supervisor. Current MMARS payment users who will approve invoices in COMMBUYS will need to be set up as AP Supervisors in COMMBUYS.

# Mapping Roles to Process

## Set-Up Reminders for OAs

**COMMBUYS Organization Administrators will need to make sure that:**

### **For PURCHASING**

- Purchasing approvers who will apply final approval to POs have valid MMARS encumbrance user access;
- There is an Encumbrance Approval path into which all other purchasing approval paths lead; and
- Purchasing approvers with required MMARS encumbrance permissions are assigned to the Encumbrance Approval path.

### **For PAYMENTS**

- AP Supervisors have valid MMARS payment user permissions;
- There is a Payments Approval path into which all payment approval paths lead;
- Payment approvers with required MMARS AP permissions are assigned to the Payment Approval path.
- NOTE: The option to centralize the AP Supervisor role is under discussion.



# Open Issues/Questions

## “Matching” Items During Receiving

**Question:** Should purchasers use two-way or three-way matching in COMMBUYS?

**Answer:** COMMBUYS enables both “two-way” and “three-way” matching of information during the receiving process.

- In a two-way matching process, quantity and amount on the vendor invoice are matched to the quantity and amount on the corresponding purchase order.
- In a three-way matching, a vendor invoice is matched to the corresponding purchase order for quantity and amount and to receiving information.

All Statewide Contracts are set up for three-way matching and so purchasers should plan to do three-way matching on all SWC orders.

### **Outstanding Issues/Questions:**

Guidance regarding two- and three-way match on for Departmental MBPOs is under development.

### **Policy Implications:**

TBD

# Open Issues/Questions

## MBPOs for Draw Down Encumbrances

**Question:** How can purchasers create an encumbrance with one vendor to set aside funds for use over a span of time, and then “draw down” those funds in a series of orders?

**Answer:** OSD is working to develop a means to enable this business functionality in COMMBUYS. The goal is to enable a solution that works for a range of contract and catalog types, including punch-out catalogs.

### **Outstanding Issues/Questions:**

Choosing the best way to customize existing COMMBUYS documents to support this business function.

### **Policy Implications:**

TBD

# Open Issues/Questions

## Open Orders

**Question:** Will Open Orders be included in COMMBUYS?

**Answer:** No. Open Orders will remain MMARS-only transactions as they are today.

**Outstanding Issues/Questions:**

TBD

**Policy Implication:**

There are ongoing policy discussions on requirements for recording open order purchases in COMMBUYS.

# Open Issues/Questions

## RPAs (Request for Payment Authorization)

**Question:** What purchases should be handled with an RPA in COMMBUYS?

**Answer:** RPAs are intended to capture purchasing transactions after the fact for purchases that cannot be handled in a standard fashion. Once the good or service is procured, departments would process either an RPA Release against an existing MBPO, or an “Open Market” RPA to process and record such purchases after the fact.

Four business cases for RPAs:

- Emergency Purchases; Off-Contract (example: snow-melters) – Open Market RPA
- Emergency Purchases; On-Contract (example: emergency roadside repairs) – Release RPA
- Normal PO Process Impractical (ex: final cost not known); On-Contract (example: fuel) – Release RPA
- Out of Policy Purchases – If purchases are made outside of COMMBUYS that should have been made through COMMBUYS, those purchases can still be recorded using an RPA type transaction.

### Outstanding Issues/Questions:

OSD will prepare additional guidance regarding RPA rollout schedule and how Departments can set up RPA-enabled Departmental MBPOs.

### Policy Implication:

TBD

# Open Issues/Questions

## Roll-up of Order Details

### Issue:

Convey order information to MMARS for encumbering and payment without flooding the accounting system with purchasing detail.

### Answer:

Commodity lines on COMMBUYS Purchase Orders that are MMARS PC transactions (i.e., goods) will be rolled up as part of the interface to MMARS for encumbrances and payments. CT transactions will not roll up.

COMMBUYS users will be able to review order detail in COMMBUYS. In addition, the COMMBUYS business intelligence reporting tool will provide users the ability to download and analyze purchasing data.

### Outstanding Issues/Questions:

OSD will provide updated user guidance about the roll-up and how data will appear in MMARS.

### Policy Implication:

TBD

# Open Issues/Questions

## Recurring Payments (RPOs)

### Question:

Will purchases that involve recurring payments (example: leases) be captured in a COMMBUYS transaction?

### Answer:

No. RPOs will remain a MMARS transaction. Procurement for appropriate goods or services should proceed normally in COMMBUYS, with bid and award posted online, and an MBPO created but NOT sent to MMARS. In MMARS, RPO and payment schedule will be set up as usual.

### Outstanding Issues/Questions:

OSD will determine the means by which “sourceable” spend for goods and services under OSD’s purview will be reflected in COMMBUYS so that spending on those goods and services is captured.

### Policy Implication:

TBD

# Open Issues/Questions

## Grant-Posting

### Question:

What are the options for enabling potential applicants to find grant opportunities in COMMBUYS without being registered vendors in COMMBUYS?

### Answer:

Upcoming enhancements to the public search function will make it easier for applicants to find grant opportunities. Bid and PO Type will be added to the public search options so that users might select “Grant” from a bid type list and search for all currently posted grant opportunities. If Departments require online application submission, the respondents will need to register as a Vendor in order to respond online in COMMBUYS. A grant-specific commodity code to facilitate registration and notification is under development and scheduled for deployment in August.

Note: Adhering to existing policy regarding posting grant opportunities and publishing selected grantees in COMMBUYS does not require that grant applicants be registered COMMUYS vendors.

### Outstanding Issues/Questions:

OSD is evaluating whether it is feasible to assign a unique code, like UNSPSC, to facilitate grant posting notifications.

### Policy Implication:

TBD

# Open Issues/Questions

## Print Form Improvements

### Question:

What are the options for including additional detail , such a delivery instructions, on order printouts?

### Answer:

OSD is evaluating options to utilize available system functionality to enable purchasers to include more order detail and clarity on the PO print form. A recommendation is due in mid-July.

In the meantime, purchasers and vendors fulfilling orders may use the Print Screen function on the online Purchase Order to print and view the full detail that has been included in the PO.

### Outstanding Issues/Questions:

OSD is developing guidance on best practices for addresses.

### Policy Implication:

TBD



# Open Issues/Questions

## Open and Rolling Contract Enrollment

### **Question:**

Is it possible to have a bidding process that allows for rolling and open enrollment on MBPOs?

### **Answer:**

The ability to support open and rolling enrollment is a requirement of COMMBUYS going forward. OSD is working to determine the best approach for implementing this capability. This functionality will be available in September.

### **Outstanding Issues/Questions:**

OSD will provide specific instructions through procurement training.

### **Policy Implication:**

Guidance on the purpose of rolling and open enrollment, and how and when it should be used will be published in advance of the function being available.

# Open Issues/Questions

## Bid and PO Type Search

### Question:

Is there an easier way to find grant postings, or see what vendors are on Statewide contracts?

### Answer:

Yes. OSD will implement some enhancements to the public search capability to address both of these question. Users will be able to search by PO and Bid Type in the public search.

- For grants, users would select “Grant” from the “Bid Type” drop down list to search for grant postings
- For statewide contract vendors, users would select “Statewide Contract” from the “Bid Type” drop down, and then could add the vendor name as part for the advanced search screen. The results will show each statewide contract the vendor was awarded.

### Outstanding Issues/Questions:

OSD will provide a schedule and updated user guidance for the search enhancements.

### Policy Implication:

None

# Open Issues/Questions

## Pend and Overridable Status Errors

### Question:

How will COMMBUYS users know that a transaction initiated in COMMBUYS is in “pend” or “reject” status in MMARS, and how will they be notified as it moved to subsequent statuses?

### Answer:

COMMBUYS users will received a message that their transaction is in pend or reject status at the time they submit it. MMARS workflow will route the issue for review and resolution to the appropriate MMARS user. The document will be locked in COMMBUYS until the transaction is final in MMARS.

### Outstanding Issues/Questions:

Solution under development about how to notify COMMBUYS users that the issue has been resolved and update the status on and unlock the document in COMMBUYS.

### Policy Implication:

TBD

# Training Schedule

## July and August

Training Class	Schedule
Receiving Training - Webinar	7/13: 10:00A – 11:00A or 1:00P – 2:00P 7/14: 10:00A – 11:00A or 1:00P – 2:00P 7/16: 1:00 P – 2:00P or 3:00P – 4:00P
Organizational Administrator – Gap Training for Experienced OAs - Webinar	7/20: 10: 00A – 11:00A or 2:30P – 3:30P 7/22: 10:00A – 11:00A or 2:00P – 3:00P 7/24: 10:00A – 11:00A or 2:00P – 3:00P
Organizational Administrator Training	8/06: 9:00A – 4:30P    OSD, Congress Street 8/12: 9:00A – 4:30P    OSD, Congress Street 8/18: 9:00A – 4:30P    OSD, Congress Street
Purchasing – Gap Training for Experienced Purchasers including Encumbering	8/04: 9:00A – 12:00P or 1:00P – 4:00P 8/11: 9:00A – 12:00P or 1:00P – 4:00P 8/19: 9:00A – 12:00P or 1:00P – 4:00P Location for above: OSD, Congress Street
Accounts Payable Training	A/P webinars during mid-July Hands-on ILT at the beginning of August

# Calendar Update

## Liaison Meeting/Training Coordination

We've done our best to offer training on Liaison Meeting days where it is practical to do so.

Liaison Meeting	Training Option
<b>Security Liaisons only</b> – Org Admins and DSOs Thursday, July 9 from 9:30-11:30 am One Ashburton Place, 10 <sup>th</sup> Floor, Conf. Rm. B	Afternoon Org Admin “gap” training One Congress Street training room 1:00-3:00 pm
<b>Security Liaisons only</b> – Org Admins and DSOs Thursday, July 16 from 9:30-11:30 am One Congress Street, 11 Floor, Training Room	Afternoon Org Admin “gap” training One Congress Street training room 1:00-3:00 pm
<b>All-Liaison Meeting</b> Thursday, July 23 from 2-4 pm One Ashburton Place, 21 <sup>st</sup> Floor, Rooms 1	No training available – All-OSD Staff Meeting in the a.m.
	July 13 through August and beyond: Focus on training for OAs, Purchasers, AP users
<b>All-Liaison Meeting</b> - Pre-Go Live Check-in Tuesday, August 25 <sup>th</sup> from 9:30-11:30 am One Ashburton Place, 21 <sup>st</sup> Floor, Rooms 1-3	Afternoon training option TBD.

# Readiness Review

## Liaison Resources

### Dedicated Liaison Web Page

We've created a web page dedicated to providing Liaisons access to meeting presentations, meeting recordings, and links to Liaison Updates sent through Constant Contact.

From the OSD main page, select "Learn About COMMBUYS" under OSD Programs, then select "COMMBUYS Liaisons" under "Find Your COMMBUYS Community."

Or simply click: <http://www.mass.gov/anf/budget-taxes-and-procurement/procurement-info-and-res/conduct-a-procurement/commbuys/resources-for-all-commbuys-liaisons.html>




The screenshot shows the Mass.gov website. The top navigation bar includes links for State Offices & Courts, State A-Z Topics, and State Forms. The main header identifies the site as 'The Official Website of the Executive Office for Administration and Finance'. Below this, the 'Administration and Finance' section is highlighted. A search bar is present on the right. The main content area features a grid of links: Budget, Taxes & Procurement; Employment, Equal Access, Disability; Property Management & Construction; and Hearings and Appeals. A breadcrumb trail shows the path: Home > Budget, Taxes & Procurement > Procurement Information > Conduct a Procurement > CO. The 'COMMBUYS' section is prominently displayed, stating it is the Commonwealth's state-of-the-art electronic Market Center. Below this, a sidebar titled 'Find Your COMMBUYS Community' lists options: Commonwealth Agencies, Local Governments, Sellers, and COMMBUYS Liaisons. A large red arrow points to the 'COMMBUYS Liaisons' link. To the right, a 'Small Business Purchasing Program (SBPP)' banner offers benefits information and registration details.

# Liaison Resources



## Links to Presentations, Emails, and Meeting Recordings

<http://www.mass.gov/anf/budget-taxes-and-procurement/procurement-info-and-res/conduct-a-procurement/commbuys/resources-for-all-commbuys-liaisons.html>

Budget, Taxes & Procurement	Employment, Equal Access, Disability	Property Management & Construction	Hearings and Appeals	Research & Technology	Employee Insurance & Retirement Benefits
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Home > Budget, Taxes & Procurement > Procurement Information > Conduct a Procurement > Resources for All COMMBUYS Liaisons

### Resources for All COMMBUYS Liaisons

[Back to COMMBUYS Home Page](#)

We have built this online "toolkit" for COMMBUYS Liaisons to serve as a resource for organizations preparing to use features of COMMBUYS Ph II. The toolkit contains copies of Liaison meeting presentations, links to email communications, and other tips and tools developed through the readiness period.


- [Phase II All Liaison Kickoff Meeting Presentation - March 30, 2015](#) 1MB
- [Phase II All Liaison Kickoff Meeting Video Presentation - March 30, 2015](#)
- [Phase II All Liaison Meeting with Project Updates - April 13, 2015](#)
- [Phase II All Liaison Meeting with Project Updates Video Presentation - April 13, 2015](#)
- [CB Phase II Liaison Meeting on Departmental Contracts - April 21, 2015](#)
- [Phase II All Liaison Meeting on Department Contracts Video Presentation - April 21, 2015](#)
- [Sample Letter to Departmental Contractors Urging Registration in COMMBUYS](#)
- [All Liaison Message #1 - Welcome + Resource Links](#)
- [All Liaison Message #2 - Schedule Update + Business Process Review](#)
- [All Liaison Message #3 - Departmental MBPOs and Catalogs](#)

YouTube

OSD OPERATIONAL SERVICES DIVISION

**COMMBUYS**  
OPERATIONAL SERVICES DIVISION

### COMMBUYS Phase II All-Liaison Update Meeting on Departmental Contracts



April 21, 2014

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0:21 / 50:12

Phase II Liaison Meeting on Departmental Contracts 21 Apr, 2015





## Contacts



### **COMMBUYS Readiness**

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### **Operational Services Division Training**

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